

Best Available Integration of Outlook and SharePoint

Interested in using Microsoft SharePoint to store, find and share your Microsoft Outlook messages? Finding that the out-of-the-box integration of Outlook and SharePoint is awkward to use?

WISDOM Message and **WISDOM DMF** from MacroView provide excellent integration of Microsoft Outlook and Microsoft SharePoint. By enabling you to view, navigate, search and manage your SharePoint document store directly from within Microsoft Outlook, these WISDOM add-ons makes SharePoint an attractive alternative to Exchange Public Folders and a **viable replacement for traditional DM systems** for managing emails and their attachments.

Out-of-the-box Outlook / SharePoint Integration

There are a number of ways you can save an email message to SharePoint using the native facilities of Outlook and SharePoint. These include:

- Drag and drop to the Explorer View of a SharePoint document library
- Connect to an Outlook discussion and save the message
- Email-enable your SharePoint document libraries
- Exchange 2007 Managed Folders



Unfortunately all of these approaches fall short in one way or another. Frustrations include attachments being split off and saved separately, poor naming of the saved message files, messages saved in EML format (which means that they cannot be opened in Outlook) and custom metadata not being prompted for immediately as the message is saved.

Recognizing that better management of email communication is a key issue for many organizations, a number of vendors have developed add-on software that improves the out-of-the-box integration of Outlook and SharePoint. All of these add-ons let you drag-and-drop in Outlook to save an email message to SharePoint, in most cases with automatic capture of email attributes such as To, From, Subject, etc.

WISDOM Message and WISDOM DMF

WISDOM Message and **WISDOM DMF** from MacroView provide the 'best available' integration of Microsoft Outlook and Microsoft SharePoint. These WISDOM add-ons enable SharePoint-based email management solutions that have excellent functionality, intuitive user interface and good performance even with very large SharePoint document stores. They make SharePoint an attractive alternative to Exchange Public Folders and a **viable replacement for traditional DM systems** for managing emails and their attachments.

The standout features of WISDOM's Outlook / SharePoint integration include:

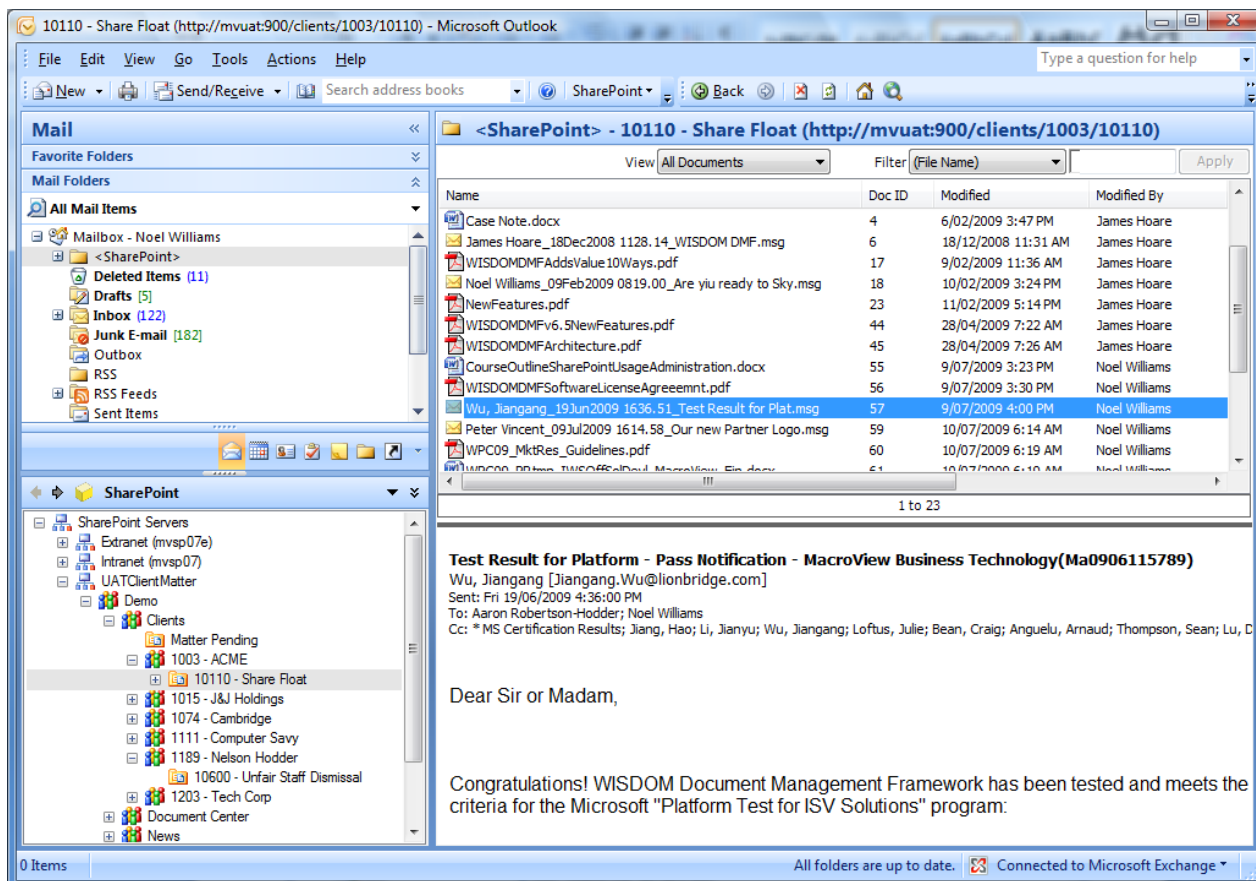
1. **Intuitive tree-view** of your available SharePoint document store, displayed in your Outlook environment.
2. **Drag and drop** to save emails or attachments to ANY library or folder.
3. **Prevent duplicate copies** of an email message in any one library.
4. Lists **all files in all views** of a document library, direct from Outlook.
5. **Previews** of MSG, DOC, XLS and PDF files stored in SharePoint.
6. **Keyword and meta-data based searching** for files and email messages stored in SharePoint, direct from Outlook.
7. **High performance, background saving** of emails and attachments and efficient support for libraries with large numbers of files.



View and Navigate the SharePoint Document Store Directly from Outlook

WISDOM DMF adds a new pane to your Outlook environment that provides an **intuitive tree-view display** of your Microsoft SharePoint document store. This SharePoint tree-view is security trimmed so that you see all the SharePoint servers, site collections, sites, document libraries, folders and files for which you have access permission, but nothing that you would not be able to access using the WISDOM Message provides a similar experience for your favorite libraries and folders in SharePoint.

When you click on a document library or folder in the tree-view you see all files in the default view of that library. All views of the library are available.



Clicking on a document library in the WISDOM tree-view in Microsoft Outlook 2007 or Outlook 2003 displays the default view of that library.

Clicking on a message item shows a **formatted preview** of the body of that message. WISDOM also previews PDFs and Word documents. You can also open that message in Outlook, exactly as it was saved – including any attachments.

While it does not include the DMF Outlook Pane, WISDOM Message allows you to drag and drop to save to, and see all views of your favourite document libraries and folders within SharePoint, and previews of popular file types within those libraries.

Clicking a column heading sorts by that column. Sorting by 'Subject' groups the messages by **Conversation Topic**, just as it does in Outlook. You can **filter the file list** to quickly and efficiently find a particular message based on its file name, subject, or other attributes.

The WISDOM DMF tree-view makes it easy to **navigate SharePoint** document stores to find a particular site, document library or folder. WISDOM is specially designed to provide good performance and minimal bandwidth usage when you are navigating a **large SharePoint site tree, high-volume document libraries or deeply nested folder structures**.

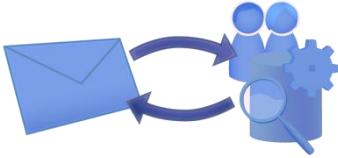
By clicking on a site in the WISDOM tree-view displays the front page of that site in the right pane of Outlook. This facilitates access to Contacts, Events, Tasks and lists managed in SharePoint – directly from Outlook.

Suitably authorized users can right click in the WISDOM DMF tree-view to **create a new library or folder**. The new libraries and folders will appear in the WISDOM tree-view for all users.

Drag and Drop to Save to Any Document Library or Folder

To save email messages or their attachments you simply **drag and drop to any library or folder** in your DMF tree-view – there is no need to first declare that library as a Favorite or to register a site.

WISDOM can assign a unique file name to each message that it saves to SharePoint, which **prevents duplicate copies** of any message being saved in a library. WISDOM can optionally delete messages from your Outlook environment as they are saved successfully to SharePoint.



A number of add-ons let you drag and drop to save emails – with WISDOM you can drag and drop to ANY document library or folder in SharePoint for which you have permission.

As it saves an email message to SharePoint, WISDOM **automatically records Outlook attributes** – such as Subject, To, CC, From, SentOn, etc. As it saves to SharePoint WISDOM will prompt immediately for values of any other custom metadata columns defined in the destination document library. WISDOM supports all metadata column types that ship with SharePoint 2007 – including Business Data columns.

WISDOM supports saving **multiple emails and multiple attachments**. Any custom metadata can be automatically applied to all the saved files.

WISDOM saves emails and other files in **Background** mode, so that you can continue to use Outlook to perform other tasks while the saving of multiple messages or attachments proceeds.

WISDOM ships with document **library templates** that contain an Email Content Type and an 'Email Messages' view. The result is that Outlook messages saved to SharePoint with WISDOM are displayed much as they would be in an Exchange Public Folder, InBox or Sent box.

Great Support for Message Attachments

WISDOM saves Outlook messages to SharePoint as MSG files, which ensures that any **attachments are preserved**.

Ever wanted to detach files from an incoming message and save them to SharePoint or to retrieve files from SharePoint to attach to a new email message? WISDOM makes it easy to **save all or selected attachments** from an open message to SharePoint, and capture any relevant metadata as you save. You can even **drag and drop to save one or multiple attachments** from messages in preview panes in Outlook.

Retrieving files from SharePoint to insert as attachments to a new message in Outlook is a multi-step process if you use 'out-of-the-box' SharePoint and Outlook. WISDOM makes it very **easy to retrieve and insert files from SharePoint as attachments**. If you prefer you can **insert links to files** rather than embed them in new messages. Inserting links rather than embedded attachments can be made the default action by using a WISDOM configuration setting.

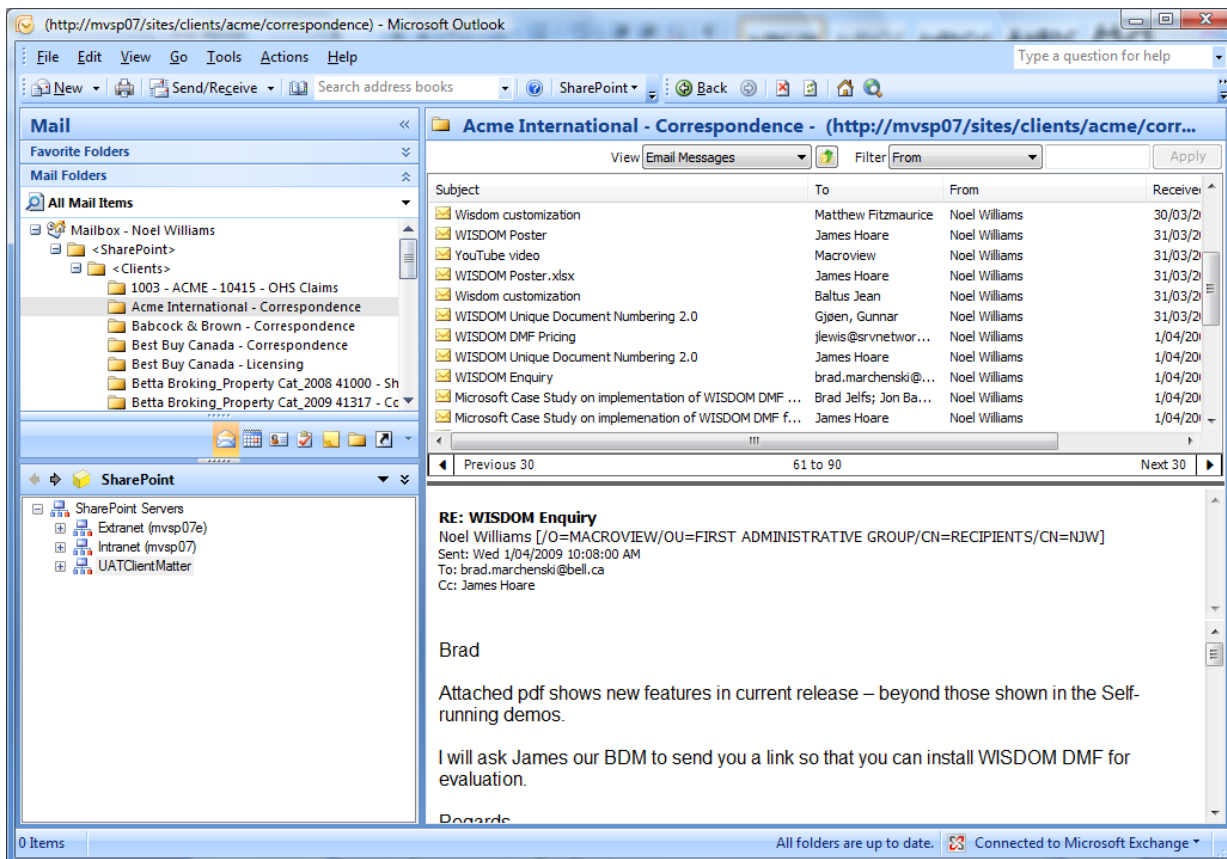
WISDOM is the best available means of saving PDFs to SharePoint from Adobe Reader.

If your email messages have PDF attachments - e.g. from a Smart Copier - then you will appreciate the way **WISDOM PDF SharePoint Save** (another module within the WISDOM Document Management Framework) allows you to save a PDF and its metadata to SharePoint direct from Adobe Reader or Adobe Acrobat. WISDOM PDF SharePoint Save is the best available integration for saving from Adobe to SharePoint – it makes navigating SharePoint intuitive and also copes well with large document libraries.

One-click Navigation with SharePoint Favorites

The 'Favorites' feature of WISDOM supports **one-click navigation** to your frequently used document libraries and folders. You can arrange your SharePoint Favorites into groups, similarly to Internet Explorer.

To add to your Favorites you simply right-click in the WISDOM tree-view on a document library or folder and select 'Add to Favorites'. A folder corresponding to each Favorite will be added automatically into your Mail Folders in Outlook.



Displaying the email messages stored in a Favorite library within SharePoint. Note preview of selected message.

You can **drag and drop to SharePoint Favorites** folders to save emails and attachments to SharePoint. Clicking a Favorite folder in Outlook displays the default view of the corresponding document library or folder in SharePoint. This is the same display as you see when you click on a library or folder in the WISDOM tree-view pane, but the Favorites streamline access to the libraries and folders that you use often.

A number of competing SharePoint add-ons also add folders to the Mail Folders list in Outlook to provide a means of interacting with SharePoint. The advantage of the WISDOM approach is that you can restrict the number of such folders because you also have the full tree-view of SharePoint available in the WISDOM Pane. Adding large numbers of additional folders causes a rapid fall-off in performance of the Outlook Mail Folders mechanism, which is central to the operation of Outlook¹. Indeed excessive numbers of additional folders can even cause Outlook to crash.

By providing a separate tree-view pane, WISDOM avoids issues that result from overloading the Folders List in Microsoft Outlook.

Offline Operation



You can drag and drop emails to your Favorites folders to save them to SharePoint when you are **working offline in Outlook**, or are otherwise unable to connect to the SharePoint server. The save to SharePoint and capture of metadata will be completed when you are next online or able to connect. By clicking on a SharePoint Favorite folder you can view the files that are awaiting the completion of their save.

You can use **Outlook Rules** and WISDOM to automate the saving of messages to SharePoint, via SharePoint Favorite folders in Outlook. As it saves messages to SharePoint, WISDOM will set Outlook attribute metadata automatically and prompt for any other custom metadata.

You can drag and drop to SharePoint Favorite folders to save emails when you are using **Outlook Web Access**.

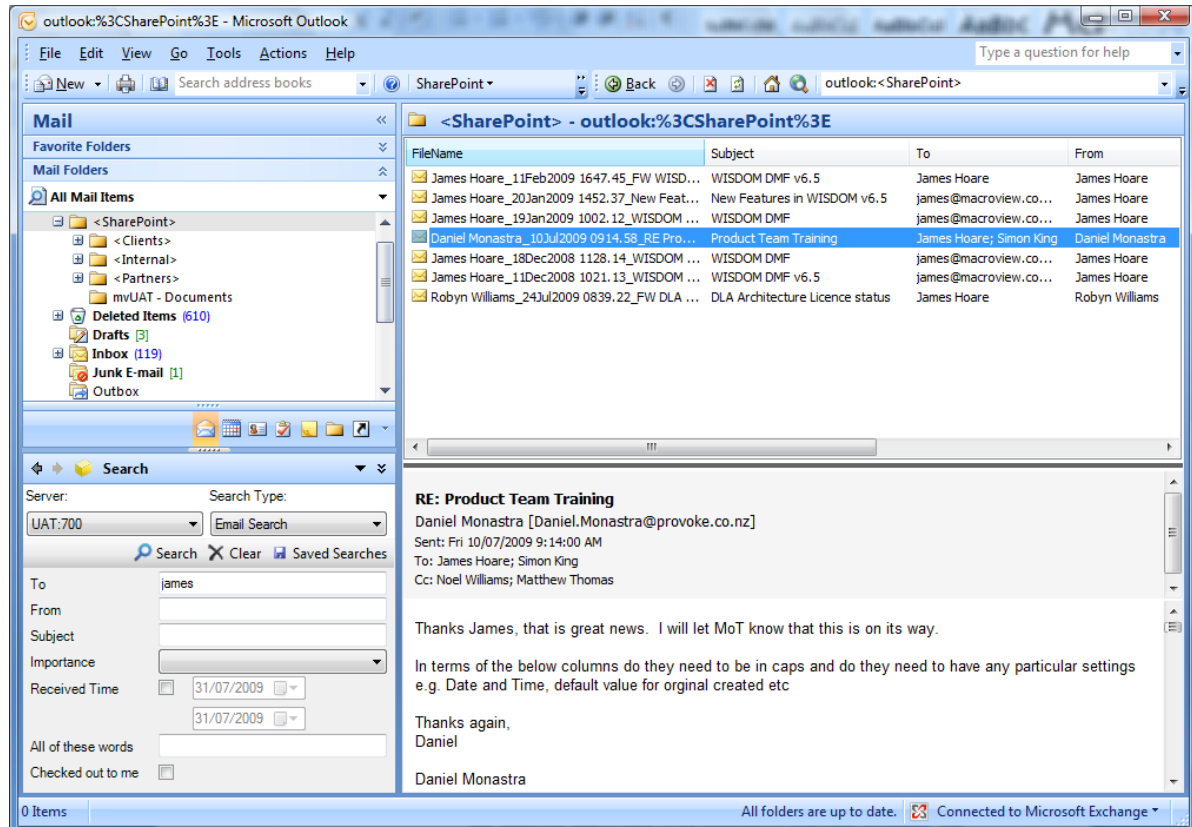
¹ This can also be a problem with ‘traditional’ DM systems, if you define excessive numbers of Search folders.

Searching the SharePoint Document Store Direct from Outlook

The 'SharePoint, Open' feature of WISDOM Message provides the same WISDOM search panels as are available in the DMF Outlook Pane..

WISDOM also assists when you want to **search for email messages** or other types of file stored in SharePoint – while you continue to work in Outlook. The 'Search' mode of the WISDOM pane in Outlook streamlines keyword and metadata-based searching using the MOSS Search Engine.

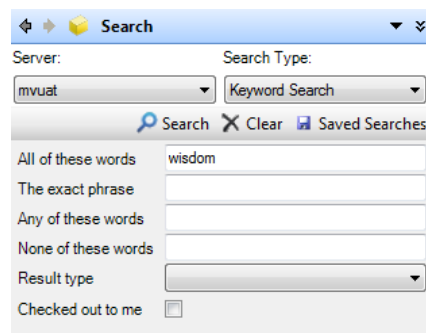
The DMF Outlook Pane facilitates searching for emails stored in SharePoint, based on their 'To' metadata attribute. WISDOM records the values of this email attribute as it saves messages to SharePoint. WISDOM calls the MOSS Search Engine to perform the search, which is an **efficient indexed search** for files stored anywhere in the SharePoint document store.



Searching for email messages stored in SharePoint, using the WISDOM pane in Outlook. Note the preview of a search result.

The WISDOM search pane is not restricted to searching for emails. The keyword search mask that ships with WISDOM allows **all types of file** to be found – e.g. Word, Excel, PowerPoint, PDFs, graphics files etc in addition to .MSG files. WISDOM provides **previews** of popular file types in search results.

WISDOM enables powerful searching for emails and other files stored in SharePoint, direct from Microsoft Outlook.



WISDOM makes it easy to keyword search for files stored in SharePoint while you work in Outlook.

WISDOM also allows a user to **save searches** and to easily re-run them again when required. Out-of-the-box MOSS 2007 does not support saved searches, so WISDOM is adding real value.

WISDOM also enables **additional search 'masks'** to be defined and made available to users in an organization. In this way the organization can facilitate searches based on its own metadata architecture.

Managing Files Stored in SharePoint

WISDOM Explorer already lets you **move and copy files** between document libraries in SharePoint – simply by copy / cut and paste or **by drag and drop**. With WISDOM Message v6.6 and WISDOM DMF v6.6, these features are now also available **while you work in Outlook**. As you move a file or files between libraries in the new WISDOM tree-view pane in Outlook, WISDOM will preserve meta-data and version history – just as it does in WISDOM Explorer.

The new WISDOM pane in Outlook also lets you perform a wide range of other tasks related to managing files that are stored in SharePoint, including open, open read-only, check out / check in / discard checkout, download, delete, view version history, manage permissions, view and edit properties, etc.

Installation and Deployment

WISDOM DMF has both client side and server side components. The same is true for WISDOM Message, the subset of WISDOM DMF that runs in Outlook. WISDOM is designed to be **easy to install and deploy**, which is particularly important in environments with large number of users.

WISDOM is designed to be easy to install and deploy, as well as easy to use.

- WISDOM server-side components ship as a SharePoint Solution (WSP), which is installed on a SharePoint web-farm and then automatically deploys to all front-end servers in the Farm.
- WISDOM License activation is also Server Farm-based – you do not need to activate the license separately on each front-end server,
- WISDOM client-side installation is done by running an MSI. Rollout of new / changed versions of the WISDOM can be automated using Active Directory Software Installation.
- Group Policy can be used for rollout of client side settings – such as whether emails should by default be deleted once saved, default setting for insert as link or embedded attachment, whether users should be prompted to save to SharePoint as they send an email.

Internally WISDOM DMF v6.6 / Message v6.6 now use VSTO v3 when running with Office 2007. WISDOM v6.6 has also been tested extensively with Office 2007 Service Pack 2.

Designed for Large SharePoint Document Stores

WISDOM is designed to provide good performance when you navigate and work with documents, even in very large SharePoint document stores:

- Multiple SharePoint web applications
- Large number of site collections
- Large numbers of sites, and libraries
- Libraries with large numbers of files
- Libraries with deeply nested folder structures

One of the ways WISDOM DMF / WISDOM Message achieves this performance is by means of custom web service, which is significantly more efficient than the standard SharePoint web services provided by Microsoft.

The 2,000 file limit that is sometimes mentioned as a limitation of SharePoint does not apply when document libraries are accessed via WISDOM. Indeed WISDOM has been shown to perform very well on document libraries that contain in excess of 180,000 files.

Saving / uploading of files is significantly faster in WISDOM DMF v6.6.

WISDOM DMF v6.6 / WISDOM Message v6.6 is much quicker when saving or uploading files and email messages to SharePoint, compared to previous versions of WISDOM.

Outlook / SharePoint Integration - email and attachment management	WISDOM Message	WISDOM DMF	WISDOM DMF Professional Legal Pack
Intuitive tree-view display of SharePoint document store, security-trimmed for each user.	✓	✓	✓
Filter / Search to locate sites, libraries and folders in the SharePoint document store.	✓	✓	✓
Drag and drop to save one or multiple emails or attachments into Favorite document libraries or folders in SharePoint.	✓	✓	✓
Drag and drop to save one or multiple emails or attachments into ANY document library or folder in SharePoint.		✓	✓
Automatic email metadata capture (To, CC, From, Subject, SentOn, etc).	✓	✓	✓
Immediate capture of other custom metadata.	✓	✓	✓
Support for multiple content types.	✓	✓	✓
Support for all SharePoint metadata column types (e.g. People and Group, BDC).	✓	✓	✓
Support for SharePoint column default values.	✓	✓	✓
Preserve attachments with saved email message (MSG).	✓	✓	✓
Prevent duplicate copies of a message in any one document library.	✓	✓	✓
Background saving, allowing you to continue with other tasks.	✓	✓	✓
Emails in a document library grouped by Discussion Threads (conversations).	✓	✓	✓
User configurable Favorites (frequently accessed libraries and folders in SharePoint).	✓	✓	✓
Support for SharePoint sites, lists, discussion boards etc.		✓	✓
Display all files in all views of a library.	✓	✓	✓
Preview emails, Word, Excel and PDF files within Outlook.	✓	✓	✓
From Outlook, search SharePoint based on keywords and / or metadata, plus ability to save and re-run Searches.	✓	✓	✓
Support for versioning, check in/check out.	✓	✓	✓
Insert Attachment into a new message from any library or folder.	✓	✓	✓
Save email messages to SharePoint when Outlook is Offline.	✓	✓	✓
Save emails to SharePoint when using Outlook Web Access.	✓	✓	✓
Save emails to SharePoint via Outlook Rules.	✓	✓	✓
In Outlook, drag and drop to move files between document libraries, preserving Version History and respecting metadata.		✓	✓
Open PDF attachments and then save them to SharePoint (with metadata) direct from Adobe Reader or Adobe Acrobat.		✓	✓
Find all emails relating to a Client and / or Matter.			✓
Find emails and other files based on their unique Document ID.			✓

For more information about WISDOM solutions, contact:



MacroView
Business Technology P/L
ACN 081 117 777
ABN 29 081 117 777

Level 12,
171 Clarence Street
Sydney NSW 2000
Australia

T: +61 2 9249 2700
F: +61 2 9279 4111
E: sales@macroview.com.au
www.macroviewwisdom.com



2009 INFORMATION WORKER SOLUTIONS
Office Solutions Development
PARTNER OF THE YEAR
FINALIST